DESTINATION
CANADA
Tourism Snapshot
A Monthly Monitor of the Performance of Canada's Tourism Industry
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KEY HIGHLIGHTS

- Over the first quarter of 2018, overnight arrivals from China surpassed arrivals from the United Kingdom, thus emerging as Destination Canada's largest long-haul market for the first time ever in any quarter.
- In Q1 2018, Canada welcomed a record high 3.1 million international overnight visitors, representing a year-over-year gain of 9.3%, as arrivals from the US (+8.9%) reached their highest level since 2005 and Destination Canada's nine long-haul markets (+10.8%) established a new peak for the first quarter of the year, respectively.
- With the Easter holiday period falling over the last weekend of March 2018, international overnight arrivals in that month registered a 15.1% gain, which was largely supported by a swell from the US (+16.2%) combined with solid growth performances from Destination Canada's long-haul markets (+14.1%) and the rest of the world (10.1%).
- A surge in overnight arrivals in March 2018 from Mexico (+41.0%), the United States (+16.2%) and the United Kingdom (+9.5%) was in part associated with travels coinciding with the Easter holiday period. The March arrivals from these markets contributed to their performances over the first quarter of 2018, with Mexico leading the way (28.2%), followed by arrivals from the United States by air (+12.9%), by automobile (+6.1%) and by other modes of transport (+7.5%), while the United Kingdom (-0.1%) recaptured losses sustained over the first two months of the year.
- The increase in overnight arrivals direct by air from Mexico in Q1 2018 (+72.7%) was commensurate with the increase in direct air capacity between Mexico City and Canada (+77.2%). Direct air arrivals accounted for 80.8% of overnight arrivals from Mexico over the first quarter of 2018.
- Overnight arrivals in March 2018 were also characterized by robust performances from Destination Canada's Asia-Pacific Region (+15.2%), where new peak arrival levels from China (+34.2%), India (+30.1%), South Korea (+22.9%) and Australia (+9.4%) combined to mask a double-digit contraction from Japan (-16.6%). Year-to-date March 2018, tourist arrivals from the Asia-Pacific region were up 12.1%.
- In Q1 2018, overnight arrivals from Destination Canada's nine long-haul markets varied by mode of entry, with direct air arrivals expanding fastest (+16.8%, representing 73.9% of tourist arrivals from these markets), which compensated for a contraction in arrivals via the US (-4.5%).

Note the following caveat from Statistics Canada associated with the March 2018 data: *Data for Statistics Canada's Frontier Counts program are produced using administrative data received from the Canada Border Services Agency (CBSA) on all international travellers who have been cleared for entry or re-entry into Canada. This includes residents of Canada, the United States and overseas entering Canada from abroad.*

In 2017, the CBSA began introducing the electronic Primary Inspection Kiosk (PIK) system at airports in Canada. The PIK system replaces the E-311 Declaration Cards that are completed by international travellers to Canada. As of the end of November, the PIK system was deployed at the following airports: Macdonald-Cartier, Ottawa (March 2017), Vancouver (April 2017), Toronto International Airport T3 (June 2017), Edmonton (September 2017), Halifax (October 2017), and Pierre-Elliot Trudeau, Montréal (November 2017).

While waiting for the introduction of PIK data into the frontier counts in the near future, Statistics Canada has prepared preliminary estimates for airports at which PIK has been deployed. These estimates are based on CBSA reports of total international travellers by airport, while the distribution between Canadian, US and travellers from individual overseas countries are modelled estimates based on historical data and trends, using methods similar to those used to do seasonal adjustment.

QUICK LINKS

UNITED STATES

MEXICO

EUROPE

ASIA-PACIFIC

Industry Performance Dashboard

	March 2018	YTD
Overnight Arrivals[1]		
Total International	↑ 15.1%	↑ 9.3%
10 DC Markets*	↑ 15.8%	↑ 9.3%
United States	↑ 16.2%	↑ 8.9%
9 Long-Haul Markets	↑ 14.1%	↑ 10.8%
Non-DC Markets	↑ 10.1%	↑ 9.1%
Air Seat Capacity[2]		
Total International	↑ 7.1%	↑ 6.3%
10 DC Markets*	↑ 6.5%	↑ 5.4%
Non-DC Markets	↑ 8.2%	↑ 8.0%
National Hotel Indicators[3]		
Occupancy Rate**	↑ 1.2	↑ 1.4
Revenue Per Available Room (Revpar)	↑ 5.5%	↑ 4.7%
Average Daily Rate (ADR)	↑ 7.5%	↑ 7.3%

Notes:
The Industry Performance Dashboard figures are year-on-year variations.
* The 10 DC markets are US, France, Germany, UK, Australia, China, India, Japan, South Korea and Mexico.
** Percentage point variations.

Sources:
1. Statistics Canada, Frontier counts, custom tabulations
2. IATA-Diio SRS Analyser
3. CBRE Hotels with reproduction and use of information subject to CBRE Disclaimer / Terms of Use as detailed at www.cbre.ca.

MARKET MONITOR SUMMARY

		Overnight Arrivals[i]		Arrival YOY Variations (%)		Air Seat capacity[ii]		Local currency vs. CAD[iii]	
	Market	Mar. 2018	YTD 2018	Mar. 2018	YTD 2018	Mar. 2018	YTD 2018	Mar. 2018 Average	YTD Average
DC North America	United States	842,298	2,079,936	16.2%	8.9%	5.5%	4.5%	-3.4%	-4.4%
	Mexico	30,519	74,859	41.0%	28.2%	79.5%	77.2%	0.0%	3.6%
DC Europe	France	28,212	89,960	3.6%	9.2%	1.8%	0.0%	11.4%	10.3%
	Germany	18,913	46,862	2.6%	8.5%	5.2%	-1.2%	11.4%	10.3%
	United Kingdom	41,540	105,625	9.5%	-0.1%	2.6%	1.5%	9.3%	7.4%
DC Asia-Pacific	Australia	13,516	56,337	9.4%	6.7%	-1.1%	6.2%	-1.6%	-0.9%
	China	38,380	131,029	34.2%	25.6%	5.5%	3.8%	5.4%	3.6%
	India	16,739	40,368	30.1%	27.6%	26.7%	29.8%	-2.3%	-0.6%
	Japan	19,937	51,711	-16.6%	-13.5%	-0.1%	-1.9%	2.8%	0.3%
	South Korea	15,323	44,372	22.9%	10.3%	13.5%	15.2%	2.2%	2.6%
Total 10 DC Markets		**1,065,377**	**2,721,059**	**15.8%**	**9.3%**				
Rest of the World		**138,011**	**375,000**	**10.1%**	**9.1%**				
Total International		**1,203,388**	**3,096,059**	**15.1%**	**9.3%**				

Sources:
i. Statistics Canada, Frontier counts, custom tabulations
ii. IATA Diio SRS Analyser
iii. Bank of Canada

Notes:
i. Arrival figures are preliminary estimates and are subject to change.
ii. Air seat capacity is the variation in the total number of seats on direct commercial scheduled flights during the current month and YTD relative to the same periods in the previous year.
iii. The exchange rate variation is calculated on the average value of the Canadian dollar during during the current month and YTD relative to the same periods in the previous year.

UNITED STATES

US Arrivals to Canada

CURRENT MONTH:

+16.2% ↑ YOY

YTD:

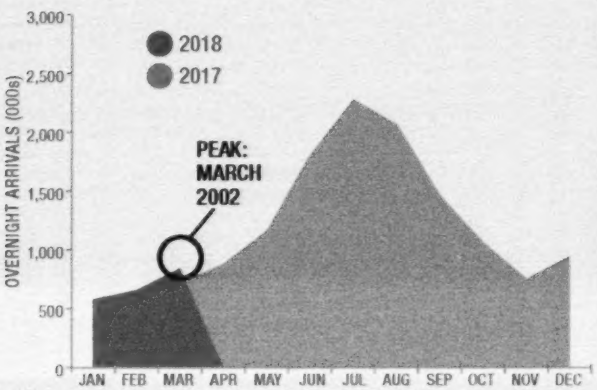
+8.9% ↑ YOY

Overnight Arrivals

	March 2018		YTD 2018	
	Arrivals	% YOY Variance	Arrivals	% YOY Variance
Automobile	469,685	19.1	1,118,528	6.1
Air	328,901	12.6	849,878	12.9
Other	43,712	13.6	111,530	7.5
US Total	**842,298**	**16.2**	**2,079,936**	**8.9**

Source: Statistics Canada, Frontier counts, custom tabulations.
Note: The figures are preliminary estimates and are subject to change.

Trend Plot: Total United States Arrivals



United States: Key Indicators

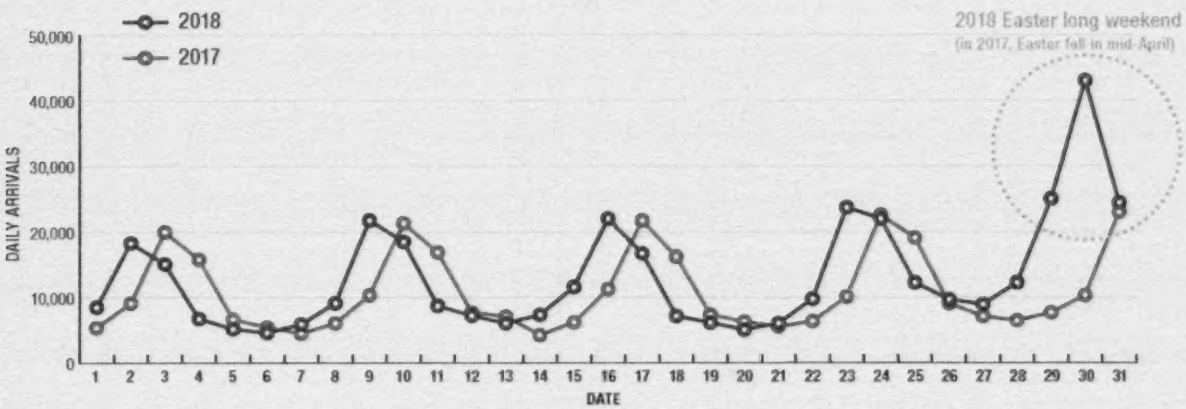
Air Seat Capacity[i]	March 2018	5.5%
	YTD	4.5%
Exchange Rate[ii]	March 2018	-3.4%
	YTD	-4.4%
Consumer Confidence Index (1985=100)[iii]	March 2018	127.0
	Previous Month	130.0
YTD Arrival Peak[iv]	Peak Year	2002
	Current % of Previous Peak	90.7%

Source:
i. IATA Dilo SRS Analyser, Year-on-year % variance.
ii. Bank of Canada, Year on year % variance.
iii. Consumer Confidence Index, the Conference Board (USA).
iv. Statistics Canada, Frontier counts, custom tabulations.

UNITED STATES

- The US market rounded out the end of a strong first quarter with an impressive surge in overnight arrivals in March 2018. With just over 842,000 visitors, March arrivals were up 16.2% year-over-year, bringing the Q1 2018 total up to 2.1 million (+8.9% over Q1 2017). These are the highest US arrivals numbers recorded since 2005, despite a weaker US dollar in Canada at the start of 2018 (-3.4% in March, -4.4% YTD).
- This strong performance from the US market continued to draw from expanded air arrivals – up 12.6% in March (+12.9% YTD) and making up about 40% of US arrivals over this period (39.0% in March, 40.9% YTD). The steady extension of air capacity between Canada and the US (+5.5% in March, +4.5% YTD) supported this shift toward more air travel to Canada.
- However, in March 2018 the biggest push in US visitation was seen from the largest segment, auto arrivals, which were up 19.1% year-over-year to reach nearly 470,000 visitors. Q1 2018 US auto arrivals reached 1.1 million (+6.1%) after a slower start to the quarter.
- Arrivals by other modes of transportation, such as bus, train, and cruise, also saw a solid increase over this period, up 13.6% in March 2018 to bring the YTD arrivals up 7.5% over Q1 2017.
- The surge in US arrivals in March 2018 compared to March 2017 can be attributed in large part to travel over the Easter long weekend, which this year fell on the last weekend of March, vs. last year when it fell mid-April. This trend can be observed in the March daily vehicle arrivals data[1], which shows the typical weekend peaks in both 2017 and 2018, but a particularly large spike in US visitors driving across the border over the Easter weekend in 2018.
- The largest share of US vehicle arrivals originated from Washington (19.4% in March, 22.4% YTD), New York (18.4% in March, 19.9% YTD), and Michigan (12.2% in March, 12.1% YTD)[2]. In March 2018, particularly notable increases were seen in vehicle arrivals from New Jersey, Pennsylvania, and New York.
- After a big jump of 5.7 points in February, the consumer confidence index published by the US Conference Board remained relatively high but dropped back down -3.0 points to 127.0 in March 2018.

Daily US Overnight Auto Arrivals – March 2018



Note: Daily US resident overnight auto arrivals at land ports with Integrated Primary Inspection Lane (IPIL).

[1] States of origin information is based on Integrated Primary Inspection Lane (IPIL) data collected from US residents entering Canada in automobiles with license plate registered in the United States.

[2] Some automobiles driven across the border may be rental vehicles. Rented vehicles in one US state may be registered in different state.

MEXICO

Mexico Arrivals to Canada

CURRENT MONTH:

+41.0% ↑ YOY

YTD:

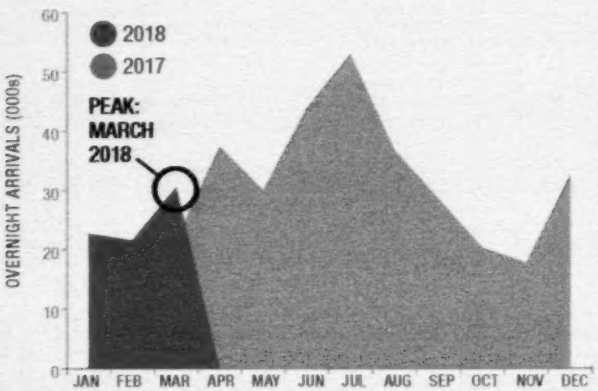
+28.2% ↑ YOY

Overnight Arrivals

	March 2018		YTD 2018	
	Arrivals	% YOY Variance	Arrivals	% YOY Variance
Mexico	30,519	41.0	74,859	28.2

Source: Statistics Canada, Frontier counts, custom tabulations.
Note: The figures are preliminary estimates and are subject to change.

Arrival Trend Plot – Total Mexico



Mexico: Key Indicators

		Mexico
Air Seat Capacity[i]	March 2018	79.5%
	YTD	77.2%
Exchange Rate[ii]	March 2018	0.0%
	YTD	3.6%
YTD Arrival Peak[iii]	Peak Year	2017
	Current % of Previous Peak	128.2%

Sources:
i. IATA-Dilo SRS Analyser, Year on year % variance.
ii. Bank of Canada, Year on year % variance.
iii. Statistics Canada, Frontier counts, custom tabulations.

MEXICO

- With a record 31,000 visitors in March 2018 (+41.0% year-over-year) and 75,000 over Q1 2018 (+28.2%), Mexico was Destination Canada's fastest growing source of international arrivals over this period. These numbers reflect new peaks in arrivals from Mexico, both for the month of March and the first quarter of the year.
- Continuing the positive trend in arrivals observed for over a year since the replacement of the visa requirement for Mexican citizens with the eTA in December 2016, there was also an extra boost in March 2018 with the Easter long weekend falling over the last weekend in March this year (vs. mid-April in 2017).
- With the vast majority of visitors from Mexico flying directly to Canada (80.8% in Q1 2018), supported by the broad expansion of direct air capacity (+77.2%), this is also where the largest growth in arrivals was observed. In March 2018, direct air arrivals were up 78.4% over March 2017, compared with air arrivals via the US, which were up 21.4%, and land arrivals via the US, which were sharply down year-over-year (-55.5%). This trend is even more pronounced over the first quarter of 2018, with direct air arrivals up 72.7% and arrivals via the US down both by air (-7.6%) and by land (-65.8%).
- The relative stability of the Mexican Peso's purchasing power in Canada (0.0% in March, +3.5% YTD) has also been in a good position in 2018 to continue supporting tourism visitation from this market.

Mexico Arrivals by Port of Entry

- Among the majority of visitors from Mexico who flew directly to Canada, the largest proportion (40.6%) flew into YYZ, followed by almost equal numbers flying into YVR (27.5%) or YUL (27.0%). While YYC received the smallest proportion of direct air arrivals (4.1%), it also saw the largest year-over-year increase in arrivals from Mexico (+398.8%).
- In Q1 2018, arrivals via the US by air and by land made up 13.4% and 5.7% of arrivals from Mexico, respectively.

			Mexico
Air Arrivals from Overseas	YYZ	Arrivals	24,561
		YOY%	52.9%
		% of Total	**32.8%**
	YVR	Arrivals	16,658
		YOY%	27.9%
		% of Total	**22.3%**
	YUL	Arrivals	16,316
		YOY%	229.4%
		% of Total	**21.8%**
	YYC	Arrivals	2,489
		YOY%	398.8%
		% of Total	**3.3%**
	All other airports	Arrivals	466
		YOY%	1.3%
		% of Total	**0.6%**
	Subtotal	Arrivals	60,490
		YOY%	72.7%
		% of Total	**80.8%**
Air Arrivals via the US	All airports	Arrivals	10,051
		YOY%	-7.6%
		% of Total	**13.4%**
Sea Arrivals	All sea borders	Arrivals	0
		YOY%	0
		% of Total	**0.0%**
Land Arrivals via US	All land borders	Arrivals	4,270
		YOY%	-65.8%
		% of Total	**5.7%**
Total Overnight Arrivals			**74,859**

Source: Statistics Canada, Frontier counts, custom tabulations, Table C.
Note: The figures are preliminary estimates and are subject to change.

EUROPE

Europe Arrivals to Canada

CURRENT MONTH:

+6.1% ↑ YOY

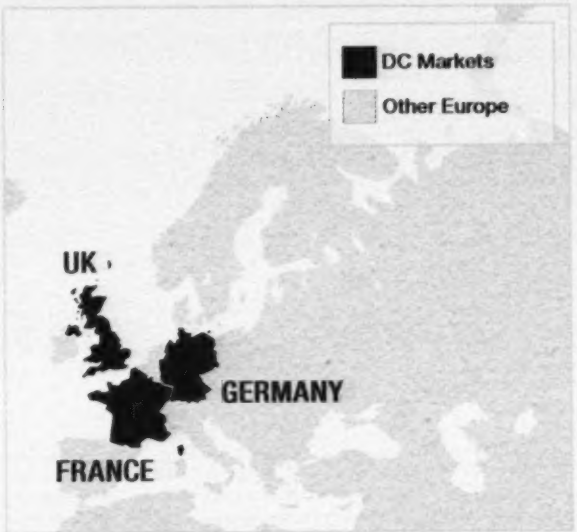
YTD:

+4.8% ↑ YOY

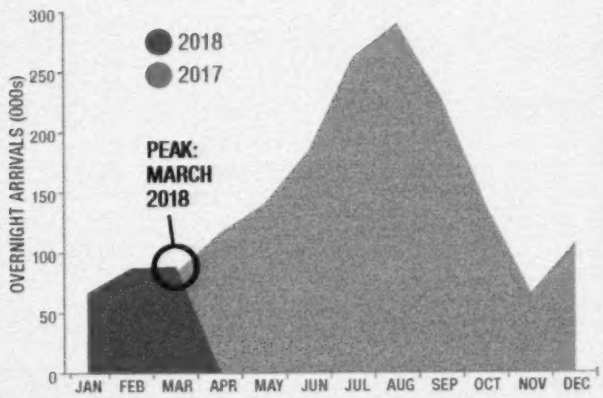
Overnight Arrivals

	March 2018		YTD 2018	
	Arrivals	% YOY Variance	Arrivals	% YOY Variance
DC Europe	88,665	6.1	242,447	4.8
United Kingdom	41,540	9.5	105,625	-0.1
France	28,212	3.6	89,960	9.2
Germany	18,913	2.6	46,862	8.5
Other Europe	54,930	45.0	154,600	68.1
Italy	5,072	1.4	13,659	9.2
Netherlands	5,786	5.1	16,735	10.4
Spain	4,478	26.2	12,234	38.6
Switzerland	5,570	4.3	15,056	-0.1
Rest of Europe	34,024	8.0	96,916	10.1
Total Europe	143,595	6.8	397,047	7.0

Source: Statistics Canada, Frontier counts, custom tabulations.
Note: The figures are preliminary estimates and are subject to change.



Trend Plot: Total DC Europe Arrivals



DC Europe: Key Indicators

		France	Germany	United Kingdom
Air Seat Capacity[i]	March 2018	1.8%	5.2%	2.6%
	YTD	0.0%	-1.2%	1.5%
Exchange Rate[ii]	March 2018	11.4%	11.4%	9.3%
	YTD	10.3%	10.3%	7.4%
YTD Arrival Peak[iii]	Peak Year	2017	1996	2008
	Current % of Previous Peak	109.2%	102.7%	74.0%

Sources:
i. IATA Diio SRS Analyser, Year-on-year % variance.
ii. Bank of Canada, Year on year % variance.
iii. Statistics Canada, Frontier counts, custom tabulations.

- Destination Canada's Europe region had a strong first quarter in 2018, reaching new monthly and quarterly arrivals records with more than 242,000 visitors (+4.8% over Q1 2017), including 89,000 visitors in March (+6.1%).
- Driving the March 2018 performance from this region was a surge in arrivals from the UK (+9.5% over March 2017) – a big turnaround for this market following 10 consecutive months of year-over-year declines. This shift was partly associated with the timing of the Easter holiday weekend in March this year. A similar pattern has been observed with this market in past years, with Easter falling in March in 2016 and in April in 2017. With the additional support of the improved strength of the British pound in Canada (+7.4% YTD), after steady declines last year, and small increases in direct air capacity (+1.5% YTD), UK arrivals in Q1 2018 were almost on par with Q1 2017 (-0.1%).
- Arrivals from France (+3.6% in March, +9.2% YTD) and Germany (+2.6% in March, +8.5% YTD) continued to grow year-over-year, both reaching new year-to-date peaks for the first quarter of the year. France also achieved a new monthly record with just over 28,000 visitors in March 2018, while Germany recorded the best March arrivals since 1996, with close to 19,000 visitors. Both markets continued to benefit from improved purchasing power in Canada due to the appreciation of the Euro (+10.3% YTD).

DC Europe Arrivals by Port of Entry

- Over the first quarter of 2018, three quarters of the arrivals from Destination Canada's Europe region were direct air arrivals (75.1%). Visitors from these markets primarily landed at YUL (36.6%) or YYZ (33.5%). In particular, more than half of French visitors to Canada flew directly into YUL (56.4% of total arrivals).
- While the decline in UK arrivals in Q1 2018 came from arrivals via the US by land (-47.5%), this is where arrivals from France (+20.5%) and Germany (+63.1%) saw the biggest increases.

			France	Germany	UK
Air Arrivals from Overseas	YYZ	Arrivals	10,349	16,546	34,001
		YOY%	-16.9%	1.1%	-2.9%
		% of Total	**11.5%**	**35.3%**	**32.2%**
	YVR	Arrivals	2,382	7,123	23,496
		YOY%	29.5%	6.6%	5.3%
		% of Total	**2.6%**	**15.2%**	**22.2%**
	YUL	Arrivals	50,696	6,104	9,719
		YOY%	21.9%	25.8%	15.3%
		% of Total	**56.4%**	**13.0%**	**9.2%**
	YYC	Arrivals	582	4,221	13,689
		YOY%	-28.8%	4.3%	4.6%
		% of Total	**0.6%**	**9.0%**	**13.0%**
	All other airports	Arrivals	435	742	1,890
		YOY%	0.8%	2.3%	2.3%
		% of Total	**0.5%**	**1.6%**	**1.8%**
	Subtotal	Arrivals	64,444	34,736	82,795
		YOY%	11.5%	6.0%	0.9%
		% of Total	**71.6%**	**74.1%**	**78.4%**
Air Arrivals via the US	All airports	Arrivals	21,164	8,358	15,889
		YOY%	0.1%	0.9%	12.4%
		% of Total	**23.5%**	**17.8%**	**15.0%**
Sea Arrivals	All sea borders	Arrivals	20	0	12
		YOY%	-37.5%	-100.0%	71.4%
		% of Total	**0.0%**	**0.0%**	**0.0%**
Land Arrivals via US	All land borders	Arrivals	4,132	3,491	5,004
		YOY%	20.5%	63.1%	-47.5%
		% of Total	**4.6%**	**7.4%**	**4.7%**
Total Overnight Arrivals			**89,960**	**46,862**	**105,625**

Source: International Travel Survey, Table C, Statistics Canada.
Note: The figures are preliminary estimates and are subject to change.

ASIA-PACIFIC

DC Asia-Pacific Arrivals to Canada

CURRENT MONTH:

+15.2% ↑ YOY

YTD:

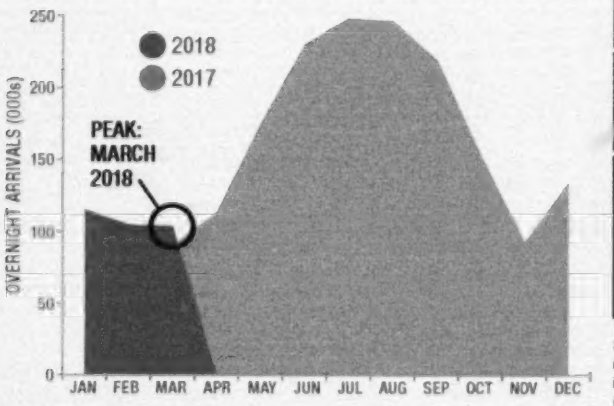
+12.1% ↑ YOY

Overnight Arrivals

	March 2018		YTD 2018	
	Arrivals	% YOY Variance	Arrivals	% YOY Variance
DC Asia-Pacific	**103,895**	**15.2**	**323,817**	**12.1**
Australia	13,516	9.4	56,337	6.7
China	38,380	34.2	131,029	25.6
India	16,739	30.1	40,368	27.6
Japan	19,937	-16.6	51,711	-13.5
South Korea	15,323	22.9	44,372	10.3
Other Asia-Pacific	**43,517**	**37.7**	**114,169**	**23.4**
Hong Kong	7,736	6.1	22,712	-6.1
Taiwan	5,724	22.9	17,063	23.0
Rest of Asia-Pacific	30,057	8.8	74,394	6.5
Total Asia-Pacific	**147,412**	**13.6**	**437,986**	**10.4**

Source: Statistics Canada, Frontier counts, custom tabulations.
Note: The figures are preliminary estimates and are subject to change.

Trend Plot: Total DC Asia-Pacific Arrivals



Asia-Pacific: Key Indicators

		Australia	China	India	Japan	South Korea
Air Seat Capacity[i]	Mar. 2018	-1.1%	5.5%	26.7%	-0.1%	13.5%
	YTD	6.2%	3.8%	29.8%	-1.9%	15.2%
Exchange Rate[ii]	Mar. 2018	-1.6%	5.4%	-2.3%	2.8%	2.2%
	YTD	-0.9%	3.6%	-0.6%	0.3%	2.6%
YTD Arrival Peak[iii]	Peak Year	2017	2017	2017	1997	2017
	Current % of Previous Peak	106.7%	125.6%	127.6%	54.9%	110.3%

Sources:
i. IATA Dio SRS Analyser, Year on year % variance.
ii. Bank of Canada, Year on year % variance.
iii. Statistics Canada, Frontier counts, custom tabulations.

- Arrivals from Destination Canada's Asia-Pacific region hit nearly 324,000 in Q1 2018 (+12.1%), including 104,000 in March (+15.2%), reaching new peaks for both the month of March and the first quarter of the year. Four of the five markets also set new records for monthly and quarterly arrivals: China, Australia, South Korea, and India.

- The biggest contributor to the Asia-Pacific region's results over this period was a remarkable performance from China in the first quarter of the Canada-China Year of Tourism (CCYT). In Q1 2018, overnight arrivals from China (131,000, +25.6%) surpassed arrivals from the United Kingdom, thus emerging as Destination Canada's largest long-haul market for the first time ever in any quarter. Following very strong gains in February, with the Lunar New Year falling in mid-February in 2018 (vs. late January in 2017), the positive trend continued into March with more than 38,000 visitors (+34.2% vs. March 2017).

- Both for the month of March and over the first quarter of 2018, strong growth in arrivals was also recorded from India (+30.1% in March, +27.6% YTD), South Korea (+22.9% in March, +10.3% YTD), and Australia (+9.4% in March, +6.7% YTD). For India and Australia this growth came primarily from direct air arrivals, while for South Korea the biggest gains were in land arrivals via the US.

- Japan (-16.1%) was the only one of Destination Canada's markets to record a decline in arrivals in March 2018, though with approximately 20,000 visitors it was still the second largest source of arrivals among Destination Canada's Asia-Pacific markets. Arrivals were also down over Q1 2018 (-13.5%). Alongside a slight decline in direct air capacity to Canada (-1.9% YTD), the drop in visitation came primarily from air arrivals – both direct (-14.6%) and via the US (-20.9%).

DC Asia-Pacific Arrivals by Port of Entry

- In Q1 2018, 70.1% of arrivals from Destination Canada's Asia-Pacific region were direct air arrivals, with the largest proportion landing at YVR (49.8%). However, YUL saw a particularly large jump in Chinese arrivals (+321.9%).

			Australia	China	India	Japan	South Korea
Air Arrivals from Overseas	YYZ	Arrivals	2,715	40,032	25,167	9,954	11,171
		YOY%	-2.9%	25.8%	81.9%	-41.5%	13.4%
		% of Total	**4.8%**	**30.6%**	**62.3%**	**19.2%**	**25.2%**
	YVR	Arrivals	23,715	44,636	5,358	26,057	14,346
		YOY%	18.9%	0.9%	9.2%	6.3%	4.5%
		% of Total	**42.1%**	**34.1%**	**13.3%**	**50.4%**	**32.3%**
	YUL	Arrivals	292	17,996	1,401	143	242
		YOY%	-31.9%	321.9%	-0.1%	-57.7%	10.0%
		% of Total	**0.5%**	**13.7%**	**3.5%**	**0.3%**	**0.5%**
	YYC	Arrivals	297	1,898	1,603	1,390	61
		YOY%	-2.6%	-13.9%	30.1%	-33.5%	-45.5%
		% of Total	**0.5%**	**1.4%**	**4.0%**	**2.7%**	**0.1%**
	All other airports	Arrivals	75	157	270	30	50
		YOY%	0.3%	0.2%	1.3%	0.1%	0.2%
		% of Total	**0.1%**	**0.1%**	**0.7%**	**0.1%**	**0.1%**
	Subtotal	Arrivals	27,094	104,719	33,799	37,574	25,870
		YOY%	14.8%	26.6%	54.4%	-14.6%	8.0%
		% of Total	**48.1%**	**79.9%**	**83.7%**	**72.7%**	**58.3%**
Air Arrivals via the US	All airports	Arrivals	24,731	14,853	3,717	10,330	6,570
		YOY%	4.4%	-6.7%	28.2%	-20.9%	4.4%
		% of Total	**43.9%**	**11.3%**	**9.2%**	**20.0%**	**14.8%**
Sea Arrivals	All sea borders	Arrivals	0	0	56	0	0
		YOY%	-100.0%	-100.0%	69.7%	-100.0%	-100.0%
		% of Total	**0.0%**	**0.0%**	**0.1%**	**0.0%**	**0.0%**
Land Arrivals via US	All land borders	Arrivals	4,437	11,410	2,702	3,786	11,899
		YOY%	-18.9%	100.7%	-60.4%	39.7%	19.1%
		% of Total	**7.9%**	**8.7%**	**6.7%**	**7.3%**	**26.8%**
Total Overnight Arrivals			**56,337**	**131,029**	**40,368**	**51,711**	**44,372**

Source: International Travel Survey, Table C, Statistics Canada.
Note: The figures are preliminary estimates and are subject to change.

CANADIAN OUTBOUND TRAVEL

Overnight Trips by Canadians

	March 2018	YOY % Variance	Jan.- Mar. 2018	YOY % Variance
United States	1,993,213	8.2	4,889,071	6.2
Other Countries	1,497,160	5.9	4,070,723	3.4
Total Trips from Canada	3,490,373	7.2	8,959,794	4.9

Source: Statistics Canada, International Travel Survey.
Note: The figures are preliminary estimates and are subject to change.

- Overnight trips by Canadians to international destinations accelerated in March 2018 to reach 3.5 million (+7.2% year-over-year). The number of overnight trips to the US (2.0 million) grew by 8.2% (+12.7 by auto, +3.7% by air, 13.7% other modes), while overnight trips to overseas destinations were up 5.9% year-over-year.
- Over the first three months of 2018, overnight international trips by Canadians edged up 4.9% to nearly 9.0 million, with trips to the US (4.9 million) up 6.2% (+7.6% by auto, +5.0% by air and +6.2% by other modes), ahead of trips to overseas destinations (4.1 million, +3.4%).

INTERNATIONAL ARRIVALS BY PROVINCE OF ENTRY

Overnight Arrivals by Province of Entry

		Newfoundland and Labrador	Prince Edward Island	Nova Scotia	New Brunswick	Québec	Ontario
Total One or more nights	2018	4,936	15	9,225	16,961	542,331	1,375,612
	Variance YOY%	0.1%	-61.5%	6.7%	3.5%	20.2%	6.7%
	Change YOY	5	(24)	581	577	91,283	86,261
US Residents by Automobile	2018	0	0	0	15,827	179,788	518,172
	Variance YOY%	0.0%	0.0%	0.0%	1.1%	6.3%	7.2%
	Change YOY	-	-	-	166	10,606	34,790
US Residents by Non-Automobile	2018	656	4	4,317	934	164,127	426,304
	Variance YOY%	-29.1%	-81.8%	-17.9%	85.0%	26.1%	5.9%
	Change YOY	(269)	(18)	(942)	429	33,982	23,610
Residents from Other Countries	2018	4,280	11	4,908	200	198,416	431,136
	Variance YOY%	6.8%	-35.3%	45.0%	-8.3%	30.8%	6.9%
	Change YOY	274	(6)	1,523	(18)	46,695	27,861

Source: Statistics Canada, Frontier counts, custom tabulations.
Preliminary estimates subject to change.

Overnight Arrivals by Province of Entry

		Manitoba	Saskatchewan	Alberta	British Columbia	Yukon	Nunavut	CANADA
Total One or more nights	2018	34,732	7,081	161,189	938,420	5,450	107	3,096,059
	Variance YOY%	3.2%	11.4%	6.0%	8.2%	19.9%	-38.5%	9.2%
	Change YOY	1,083	726	9,065	71,163	906	(67)	261,559
US Residents by Automobile	2018	23,382	5,787	11,350	359,032	5,190	0	1,118,528
	Variance YOY%	4.4%	10.1%	-0.8%	4.8%	23.5%	0.0%	6.1%
	Change YOY	981	533	(92)	16,524	986	-	64,494
US Residents by Non-Automobile	2018	10,112	815	98,406	255,638	79	16	961,408
	Variance YOY%	-1.4%	12.1%	9.6%	18.1%	36.2%	433.3%	12.2%
	Change YOY	(141)	88	8,609	39,234	21	13	104,616
Residents from Other Countries	2018	1,238	479	51,433	323,750	181	91	1,016,123
	Variance YOY%	24.4%	28.1%	1.1%	5.0%	-35.8%	-46.8%	10.0%
	Change YOY	243	105	548	15,405	(101)	(80)	92,449

- In the first quarter of 2018, the largest proportions of international visitors to Canada crossed the border in Ontario (44.4%), British Columbia (30.3%), and Quebec (17.5%). The biggest increase in arrivals compared to the first quarter of 2017 was in Quebec (+20.2%, an additional 91,000+ visitors).
- The Maritime provinces without land ports (Newfoundland and Labrador, Prince Edward Island, Nova Scotia), as well as Manitoba, noted declines in US non-auto (by air, boat, train or bus) arrivals over Q1 2018, while international arrivals from other countries were generally more stable.

ACCOMMODATION

Hotel Performance Indicators by Province

	Occupancy Rates				Average Daily Rate (ADR)				Revenue Per Available Room (RevPAR)			
	Mar. 2018	YOY^ Variance	Jan.-Mar.	YOY^ Variance	Mar. 2018	YOY % Variance	Jan.-Mar.	YOY % Variance	Mar. 2018	YOY % Variance	Jan.-Mar.	YOY % Variance
Alberta[1]	54.0%	1.5	49.6%	1.9	$128.11	-0.2%	$126.64	-0.9%	$69.24	2.7%	$62.81	3.2%
British Columbia	68.3%	1.9	62.5%	1.7	$167.10	10.7%	$167.10	9.8%	$114.20	13.9%	$104.44	12.9%
Saskatchewan	56.3%	3.4	51.1%	3.0	$120.20	-1.3%	$117.55	-3.0%	$67.67	5.1%	$60.01	3.2%
Manitoba	66.9%	-3.3	62.5%	-0.5	$124.59	2.5%	$122.73	2.1%	$83.37	-2.3%	$76.69	1.3%
Ontario	64.1%	2.1	60.1%	2.3	$151.31	6.2%	$147.10	5.6%	$96.93	9.9%	$88.42	9.7%
Quebec	61.7%	-0.3	59.4%	-1.2	$152.85	3.4%	$153.35	3.0%	$94.38	2.9%	$91.03	1.0%
New Brunswick	51.1%	-1.1	47.0%	0.0	$117.30	2.7%	$116.06	4.0%	$59.91	0.5%	$54.55	4.0%
Nova Scotia	64.1%	0.4	51.7%	0.1	$130.05	5.1%	$126.03	4.4%	$83.38	5.8%	$65.12	4.5%
Newfoundland	42.6%	-19.5	39.7%	-10.7	$131.66	-3.5%	$131.59	-0.6%	$56.04	-33.8%	$52.26	-21.7%
Prince Edward Island	32.0%	-4.0	37.6%	-1.6	$106.47	2.3%	$111.46	6.8%	$34.02	-9.2%	$41.92	2.4%
Northwest Territories	88.8%	7.4	83.4%	4.9	$157.06	6.4%	$154.23	4.1%	$139.51	16.0%	$128.69	10.6%
Yukon	57.6%	-2.1	53.0%	-0.8	$127.40	8.3%	$123.19	6.5%	$73.33	4.5%	$65.28	4.9%
Canada	**61.7%**	**1.2**	**57.2%**	**1.4**	**$148.40**	**5.5%**	**$146.42**	**4.7%**	**$91.49**	**7.5%**	**$83.70**	**7.3%**

Note: Based on the operating results of 237,545 rooms (unweighted data).
^ Percentage points.
[1] Excluding Alberta resorts.

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- The National Occupancy Rate inched up 1.2 points year-over-year to reach 61.7% in March 2018. For Q1 2018, the rate sat at 57.2%, up 1.4 points over Q1 2017. Both in March and over Q1 2018, the Northwest Territories continued to report occupancy rates well above average (88.8% in March, 83.4% YTD), as well as the strongest year-over-year growth in occupancy. British Columbia (68.3% in March, 62.5% YTD) and Manitoba (66.9% in March, 62.5% YTD) were also among the top performers for this measure.

- At the national level, the average daily rate (ADR) sat at $148.40 in March (+5.5%) and $146.42 YTD (+4.7%). The highest ADRs were recorded in British Columbia ($167.10 both for March and YTD) and Northwest Territories ($157.06 in March, $154.23 YTD), along with Quebec ($152.85 in March, $153.35 YTD).

- In the first quarter of 2018, Canada's average revenue per available room (RevPar) continued to increase at a fast pace over the same period in 2017, sitting at $91.49 (+7.5%) in March and $83.70 (+7.3%) YTD. Northwest Territories ($139.51 in March, $128.69 YTD) and British Columbia ($114.20 in March, $104.44 YTD) continued to lead the provinces in RevPar, including the strongest year-over-year growth. Ontario ($96.93 in March) and Quebec ($91.03 YTD) were also top performers.

- Newfoundland noted year-over-year declines across all three measures in Q1 2018, and particularly in March 2018. This can primarily be attributed to elevated results in 2017, when St. John's hosted the Tim Hortons Brier, as well as additional rooms added in recent months.

ACCOMMODATION

Hotel Performance Indicators by Property Type

	Occupancy Rates				Average Daily Rate (ADR)			
	Mar. 2018	YOY^ Change	Jan.- Mar.	YOY^ Variance	Mar. 2018	YOY Variance	Jan.- Mar.	YOY Variance
Property Size								
Under 50 rooms	45.5%	0.6	42.5%	0.6	$108.07	4.1%	$107.12	3.8%
50-75 rooms	53.9%	1.5	50.6%	2.1	$111.18	3.8%	$109.92	3.6%
76-125 rooms	60.3%	1.2	55.7%	1.7	$125.06	3.2%	$124.12	2.7%
126-200 rooms	62.5%	0.4	57.6%	0.9	$136.30	5.1%	$134.44	4.3%
201-500 rooms	65.3%	1.3	61.0%	1.4	$175.75	7.0%	$175.10	6.5%
Over 500 rooms	70.4%	2.4	64.9%	0.5	$218.20	6.3%	$208.29	6.0%
Total	**61.7%**	**1.2**	**57.2%**	**1.4**	**$148.40**	**5.5%**	**$146.42**	**4.7%**
Property Type								
Limited Service	56.6%	1.3	52.5%	1.8	$114.69	3.2%	$113.35	3.0%
Full Service	63.9%	1.3	59.1%	1.4	$157.81	5.7%	$153.92	5.1%
Suite Hotel	70.6%	0.1	65.8%	0.1	$157.50	7.7%	$154.78	6.4%
Resort	63.3%	0.8	59.4%	-0.4	$239.34	10.7%	$250.28	9.5%
Total	**61.7%**	**1.2**	**57.2%**	**1.4**	**$148.40**	**5.5%**	**$146.42**	**4.7%**
Price Level								
Budget	54.2%	1.7	50.2%	1.7	$99.34	6.7%	$98.53	7.1%
Mid-Price	62.6%	0.7	57.8%	1.2	$138.53	3.3%	$136.48	3.0%
Upscale	67.3%	1.7	63.3%	0.9	$243.07	8.2%	$239.23	6.7%
Total	**61.7%**	**1.2**	**57.2%**	**1.4**	**$148.40**	**5.5%**	**$146.42**	**4.7%**

Note: Based on the operating results of 237,545 rooms (unweighted data).
^ Percentage points.

- Over the first quarter of 2018, larger properties (500+ rooms) continued to report the highest occupancy rates (vs. smaller properties), with an average occupancy rate of 64.9%. Those larger properties also recorded the highest ADR in Q1 2018 ($208.29).
- In line with recent trends, suite hotels recorded the highest occupancy rates in Q1 2018 (65.8%), but Limited Service and Full Service hotels saw stronger year-over-year growth in this measure. Resorts reported the highest ADR in the first quarter of 2018 ($250.28), as well as the strongest year-over-year growth (+9.5%).
- In Q1 2018, the highest occupancy rates (63.3%) and highest ADR ($239.23) were reported by upscale properties. While budget properties still posted slightly bigger year-over-year increases over the quarter, the growth from upscale properties was on par or ahead of budget properties in March 2018.